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Press Release

Netflix remains No. 1 for “Depth of Exclusive Programs” Disney+ makes big leap, battles with Amazon for 2nd place

from “Brand Loyalty Survey for Subscription Media Streaming Services in Japan” report

Tokyo, April 15, 2021 - GEM Standard publishes monthly reports called "Brand Loyalty Survey for Subscription Media Streaming Services in Japan" which contains the penetration, potential acquisition, potential leakage and brand image of subscription-based video on demand services (SVOD) in Japan. We have just released the April 2021 issue of it.

Based on the results of the report, we have focused on the one-year trend of “Depth of Exclusive Programs” for SVOD. This is the percentage of people who responded that each SVOD service has or is likely to have titles that can only be watched there, regardless of whether or not they have used the service. In other words, It can be said to be an indicator of whether or not consumers feel that each service has a wide variety of original titles or many exclusive titles.

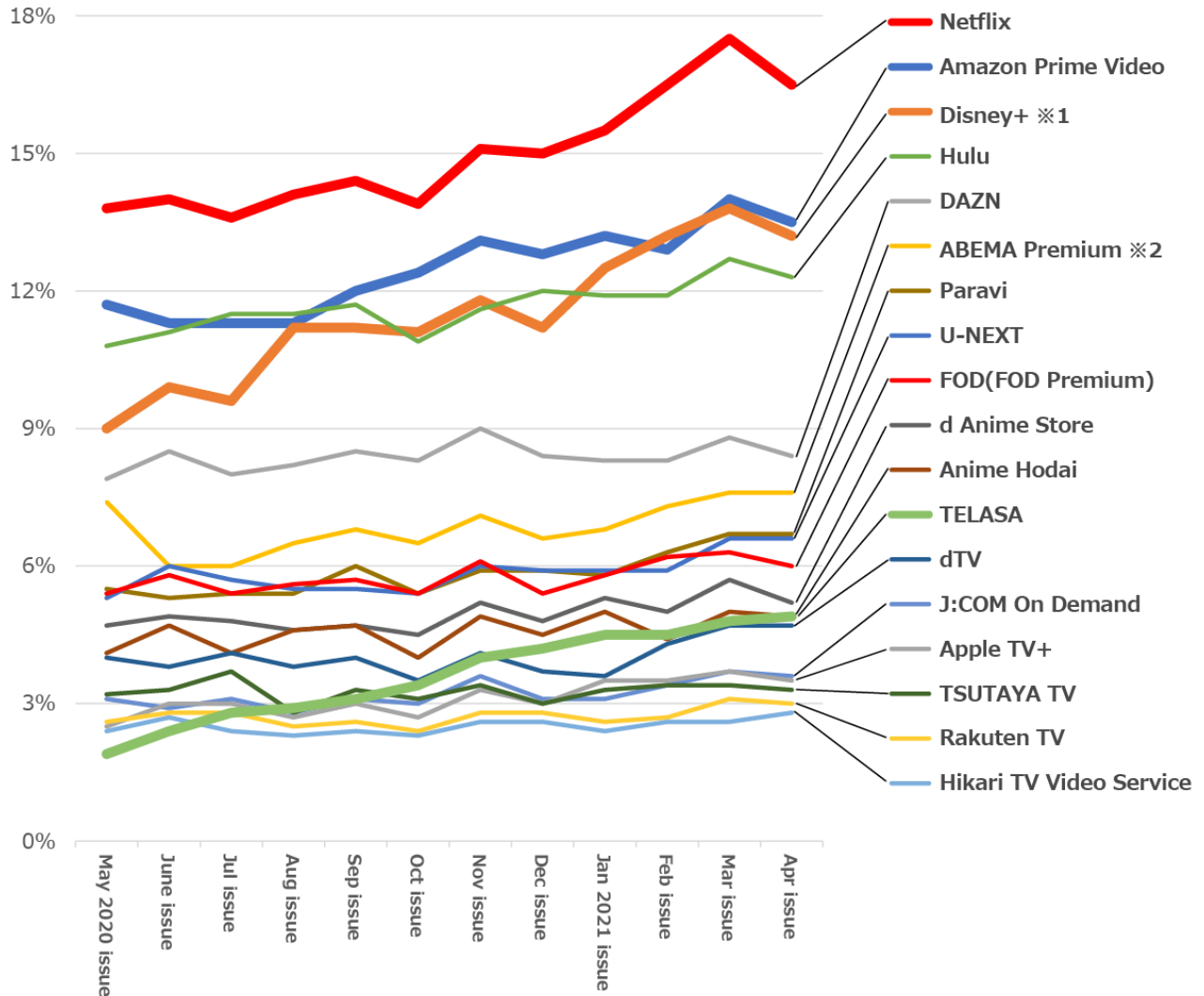
[Survey Highlights]

Indicator: Depth of Exclusive Programs [May 2020 to April 2021 issues]

- **Netflix Continues to Raise Value and Dominate No.1**
- **Disney+ Makes Big Leap, Battles with Amazon for 2nd Place**
- **Annual Increases of 2.0 pts or More are Disney+, TELASA, and Netflix.**

“Depth of Exclusive Programs” Changes by service

(%、100%=All Respondents [Males and Females living in Japan from ages 15 to 69])
The survey date for each issue is conducted in the end of the previous month.
(e.g., The value of April 2021 issue is surveyed at the end of March)



※1 : Until the Jun 2020 issue, the former name "Disney DELUXE" was used for questions.

※2 : Until the May 2020 issue, the former name "Abema Video(Premium Plan)" was used for questions.

Source: Brand Loyalty Survey for Subscription Media Streaming Services in Japan

GEM Standard

Indicator: Depth of Exclusive Programs [May 2020 to April 2021 issues]

The above graph shows the change in the value of "Depth of Exclusive Programs " from the May 2020 to April 2021 issues of the "Brand Loyalty Survey for Subscription Media Streaming Services in Japan". Please note that the values for each issue are those surveyed at the end of the previous month.

Netflix Continues to Raise Value and Dominate No.1

Netflix took the No. 1 spot one year ago in the May 2020 issue (survey conducted at the end of April of the same year), ahead of the No. 2 spot, and has continued to increase its value ever since, taking the No. 1 spot in the latest survey conducted in April 2021 (survey conducted at the end of March of the same year).

Netflix effectively distributes titles labeled as "Netflix Originals," including the hit drama "Crash Landing on You," which ranked 15th in the cross-platform survey "Subscription Video on Demand Service Viewership Ranking for March*". Netflix is considered to be the most successful SVOD service in promoting the image that "having a wide variety of original titles or many exclusive titles".

*source: GEM Ranking Club (Survey period 2021/2/27-3/26)

Disney+ Makes Big Leap, Battles with Amazon for 2nd Place

Disney+ is the top annual gainer in the survey services. In the May 2020 issue (surveyed at the end of April of the same year), Disney+ was ranked 4th, but it has risen steadily and was ranked 2nd in the February 2021 issue (surveyed at the end of January of the same year). On the other hand, Amazon Prime Video has also been increasing its value. In the April 2021 issue (surveyed at the end of March of the same year), it took second place, beating out Disney+. Since the February issue, the gap between Amazon Prime Video and Disney+ has been very close, and it is expected that they will continue to switch places.

Annual Increases of 2.0 pts or More are Disney+, TELASA, and Netflix.

During the period shown in the graph above (May 2020 to April 2021), the services that increased by 2.0 pts or more were Disney+ (+4.2 pts), TELASA (+3.0 pts), and Netflix (+2.7 pts). TELASA changed its service name from "Video Pass" to "TELASA" on April 7, 2020, and has been steadily increasing its value since then.

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This press release is based on GEM Standard's report, "Brand Loyalty Survey for Subscription Media Streaming Services in Japan". It is a monthly tracking report which introduces 18 subscription-based video on demand services. It contains a wide range of survey like "Awareness/usage", "Potential for Acquiring New Users", "Inflow and Outflow Analyses" and so on. We encourage you to use it as a source of information for proposals as well as to understand positioning and advertising effectiveness.

Survey overview

Product name: Brand Loyalty Survey for Subscription Media Streaming Services in Japan

Sampling Method: Online Questionnaire sent by e-mail

Survey target: Males and Females living in Japan from ages 15 to 69

The number of respondents: around 10,000

Survey Date: conducted at the end of the previous month of each issue

Weighing of the figures: Composition ratios by sex and age group have been weighted so that they correspond to the population composition of Japan.

About GEM Partners inc.

GEM Partners Inc. launched in 2008 in Japan. The company provides data x digital marketing services for the entertainment industry. 10+ years experience in providing the most trusted and accurate predictive analysis of theatrical and home entertainment revenue, and digital media execution services with unmatched marketing insights and analytical expertise in the entertainment industry.

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